



Haefele Flanagan 



STARBOARD ADVISORS
— YOUR RIGHT OF WAY —
A DIVISION OF KELLEHER FINANCIAL ADVISORS, LLC

Fast Forward:

Accelerating Family-Owned Businesses
And Helping The Next Generation

Tavistock Country Club
May 2, 2024

Agenda

Fast Forward: Accelerating Family-Owned Businesses and Helping The Next Generation

Thursday, May 2, 2024

Tavistock Country Club

10:00 am ARRIVAL

10:15 am **Bart Weisenfluh**
CEO Starboard Advisors **Welcome!**

10:30 am **David Caslow** **4th Generation Owner-Operator | Acme Smoked Fish**

11:15 am **Marisa Edmund** **3rd Generation Chairman | Edmund Optics**

12:00pm - 1:00pm LUNCH

1:00 pm **Michael Vaughan** **Co-Founder & General Partner | Vera Equity**

1:45 pm **Sean Kelleher** **Kelleher Family**

2:30pm - 2:45pm BREAK

2:45 pm **Chris Ballou** **Co-Founder | Patriot Group Global**

3:30 pm **Travis Coley**
WhitePenny **Speaker Panel**

4:00 pm RECEPTION

Speakers



Barton W. Weisenfluh, CFP®
CEO & Founder
Starboard Advisors

Bart Weisenfluh has worked with families for over 20 years in the investment management and financial planning business. He began his career in the executive training program at Tucker Anthony, Inc. In 1998 he joined the New York based money management firm W.P. Stewart as Vice President and assisted with the opening of their Portland office. He co-founded Plimsoll Mark Capital in 2008 where he served as a fiduciary for families in North America. Mr. Weisenfluh holds a B.A. in Political Science with a minor in Japanese from Union College and an M.B.A. from the Whittemore School of Business at the University of New Hampshire. He also is a Certified Financial Planner™ professional. Mr. Weisenfluh has served on the board of directors for Big Brothers Big Sisters of Southern Maine, Portland Yacht Club, Add Verb Productions and the Falmouth Youth Lacrosse Association. In addition, he serves on private advisory boards for numerous families.



David Caslow
Chairman & CEO
Acme Smoked Fish

Dave Caslow is the 4th generation owner and operator at Acme Smoked Fish, the largest producer of smoked salmon in North America, with operations and business interests in Brooklyn (NY), Florida, North Carolina, Massachusetts, Chile and Denmark. Acme serves the growing appetite for high-quality, premium crafted smoked seafood.

Speakers



Sean Kelleher
The Kelleher Family

Sean is the President of Wall Street Access and has helped guide the firm through successful ventures in online brokerage, institutional research, equity trading, listed derivatives trading, fixed income trading and wealth management. Sean manages a team of traders and salespeople at Wall Street Access and is responsible for providing leadership and awareness for the WSA and KFA brands. In addition, Sean runs the firms' business development efforts and is responsible for the growth of Wall Street Access's Global Execution Services platform. Sean is a member of the Investment Committee. Sean is a graduate of Wagner College and sat on the Wagner College Finance Committee. Sean also serves on the board of the St Patrick's Day Parade - the oldest parade in the country. He also serves on the board of New World Prep, a charter school in Staten Island that the Kelleher Family helped launch and continues to support. Sean has securities licenses based on the following examinations: Series 7,63,4,9,10 and 55.



Neil Cataldi
Chief Investment Officer
Starboard Advisors

Neil Cataldi previously served as Chief Investment Officer for the Viking Group, a single family office in Cherry Hill, NJ where he led the investment process for \$250 million in assets under management. Mr. Cataldi has over 20 years of Wall Street industry experience across equities, options, alternatives, and Family Office governance. He began his career on the floor of the Philadelphia Stock Exchange where he worked for both TFM Investment Group and Goldman Sachs. He then worked as a derivatives strategist at Susquehanna International Group, generating stock and option trading ideas, mainly within the Consumer sector. Neil has also consulted for multiple private Family Offices managing a range of investments, including actively managed equity and fixed income portfolios, as well as the oversight and management of a large portfolio of hedge funds.

Speakers



Jim Rogers, CPA, MAFF, CFF
Managing Partner
Haeefe Flanagan

Jim has been with Haeefe Flanagan since 1985 and offers more than four decades of national and regional experience. His areas of expertise include audit, private business consulting, succession planning, mergers and acquisitions, litigation support and forensic accounting. Jim graduated with his Bachelor of Science in Accounting from La Salle University and is a licensed CPA in Pennsylvania, New Jersey, New York, and Delaware. Jim works primarily in the not-for-profit, real estate development, construction, service, manufacturing, and leasing industries. He serves on the Board of Directors for the Building Industry Association of Philadelphia, Holy Redeemer Health System, and BCA Philadelphia. Jim is affiliated with American Institute of Certified Public Accountants, New Jersey Society of Certified Public Accountants, Pennsylvania Institute of Certified Public Accountants, National Association of Certified Valuation Analysts, and CPAmerica, Inc. In addition, he is actively involved with The Alzheimer's Association and is a proud inductee of the La Salle University Hall of Athletes as a member of the 1977 Lightweight 8.



Marisa Edmund
Chairman of the Board
Chief Global Marketing
& Sales Officer
Edmund Optics

Marisa has over 23 years in the Photonics industry as a Global Leader in Direct Marketing, Sales, Organizational Development and Strategic Planning. She is a Third-Generation owner of Edmund Optics Inc.

Speakers



Dave Bookbinder, ASA, CEIV
Executive Director,
Valuation Services
Haefele Flanagan

Dave has a diverse background in corporate finance consulting with specific expertise in the areas of business valuation and intellectual property valuation. He has led valuations of the securities and intangible assets of public and private corporations (under IRC 409a, ASC 820, ASC 805, ASC 350 and ASC 718) for various purposes including acquisition and divestiture, fairness opinions, reorganizations, estate planning and regulatory compliance.

Over the years, Dave and his teams have prepared valuations of business enterprises, intellectual property, capital stock and stock options for purposes such as mergers and acquisitions, recapitalizations, and S-Corporation conversions. During his career, Dave has also provided financial advisory services to client companies for strategic planning purposes including buy-side and sell-side mergers and acquisitions, private placements of senior debt, securitization of lease and loan receivables and pre-acquisition purchase price allocation analysis.

He is a frequent Contributor for CFO University, Executive Committee Member for Accounting and Metrics at the Enterprise Engagement Alliance, and a member of CPAmerica, Inc. Dave is the author of *The NEW ROI: Return On Individuals* and *The NEW ROI: Going Behind The Numbers*, and he is the host of the business talk show, *Behind The Numbers*.

Dave graduated with his Bachelor of Business Administration in Economics from Temple University and his Master of Business Administration in Finance from Drexel University.

Speakers



Michael Ouellette
President
Starboard Advisors

Michael Ouellette joined Starboard Advisors in January of 2022 and serves as the company's President. Prior to Starboard Advisors, Mr. Ouellette was a family office executive for 24 years and representing family assets of over \$4 billion. Mr. Ouellette began his career with a four-generation family office based in Portland, Maine, serving as Executive Vice President and Treasurer of Dexter Enterprises, Inc. from 1997 to 2014. From 2014 to 2021, Mr. Ouellette served as CEO for Ten Mountain Capital, a two-generation family office based in Boston, Massachusetts.

Mr. Ouellette continues to serve as an independent director and trustee for multiple families and also serves on the board of directors for both publicly-traded and privately-held companies.

Through his work, Mr. Ouellette has helped families implement best practices for family governance, next-gen education, investment management, cash management, estate and tax planning, and charitable initiatives. Mr. Ouellette's direct work experience includes: establishing family office governance structures; managing daily operations and staff; investment committee work including implementing investment mandates, manager/consultant selection, and investment performance monitoring; trustee and trust administration for hundreds of trusts; due diligence and oversight for private companies and real estate holdings; estate administration and ongoing estate planning and wealth transfer strategies; periodic tax planning for individuals, LLCs, and trusts; private foundation management and charitable giving; and developing and implementing family education curriculum for next generations.

Speakers



Travis Coley
Director of Growth & Strategy
Whitepenny

Travis is the Director of Growth & Strategy at Whitepenny. Leaning on two decades of strategic planning and corporate finance experience, Travis helps advise clients through the lens of gaining strategic advantage, growth, capital investment, and brand as an asset. He partners with clients to define brand strategy and establish a differentiated market position.



Beth Renga
Director of Consulting Services
Haefele Flanagan

With over three decades of consulting and advisory experience, Beth is driven by her passion for guiding entrepreneurs toward achieving their personal and professional aspirations. As Director of Consulting Services, she fosters robust client relationships and provides strategic oversight for HFConsulting offerings, which encompass strategic and succession planning, professional development for individuals and teams, fractional CFO and COO services, and value enhancement, all tailored to the needs of our diverse clientele. Beth's background spans leadership roles in start-ups, mid-sized, and international consulting firms, complemented by academic achievements including a BA in Psychology and a Masters in Social Work. With a keen focus on family-owned businesses, her multifaceted expertise and unwavering commitment to client success and organizational excellence make her an invaluable partner in propelling businesses toward sustainable growth, enhancing value, and facilitating seamless transitions in today's dynamic marketplace.

Speakers



Erica Peterson, CPA
Partner
Haefele Flanagan

Since joining Haefele Flanagan in 2001, Erica has provided diverse public accounting experience rendering accounting and assurance and tax services to clientele. Industry exposure includes private for-profit and nonprofit audits, charter school audits, HUD entity audits, single audit, wholesale distribution, manufacturing, construction contracting and services, real estate, retail, and various service industries.

Erica received her Bachelor of Science in Accounting from Rutgers University, Camden and is Certified Public Accountant in Pennsylvania and New York. She is affiliated with American Institute of Certified Public Accountants, Pennsylvania Institute of Certified Public Accountants, and CPAmerica, Inc.



Michael Vaughan
Co-Founder & General Partner
Vera Equity

Mike is an accomplished fintech operator, investor and advisor. He has spent 20+ years at high-growth tech companies. Most recently as the COO of Venmo, he helped lead the business from its Series A round in 2011 to acquisition by Braintree in 2012, and then again by PayPal in 2013 as part of the \$800 million Braintree deal. By the end of Mike's tenure, Venmo had grown to 40M active users and \$300M annual revenue run-rate. Since leaving Venmo in 2019, he has spent the past few years as an active angel investor, building a portfolio of more than 75 high-growth tech companies, and is currently an operating partner at Stripes, a growth equity investment firm.

Speakers



Kendra Brill

Professional EOS Implementer
& Business Coach

Kendra Brill is an entrepreneur who has been coaching companies and executive teams for over fifteen years. After her entrepreneurial career, she helped create a family office venture portfolio for a regional New Jersey family, serving as Managing Director during the life of the portfolio. During that time, she coached entrepreneurial companies and leadership teams in a variety of sectors, ranging from energy, transportation and health technology to software and consumer products, as well as service-based businesses. Today, Kendra is an EOS Implementer, coaching Executive and Leadership Teams around the country, helping them to implement the EOS Process and Tools into their businesses.



Chris Ballou

Co-Founder Patriot Global

Chris Ballou was a founder of Patriot Group Global, a boutique white glove security provider to Fortune 100 companies and private family offices, now a division of GardaWold Security.

Chris managed Global Operations for Patriot overseeing \$75M+ in security service programs annually. In addition, Chris specialized in providing international threat assessments for private, commercial, industrial and government clients. One of Chris's specialties was the design and build out of "safe rooms" for private residences.

Contact us

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